Session 2: Module 4 - Search Part 4	
SCRIPT	
Description	**Text**
Introduction	**Welcome** to M-SPIRIT **Session 2 Module 4 of** the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
Start	Participant Search and List – Part 4
<newmbr>	In the last module we created a new household. In this module, we are going to add members to that household.
	Again, notice that most of the icons are disabled.
	Let's search the Local database using the Last Name: FLOWER.
	Can you remember how to do that?
<newmbr1>	<no script>
<newmbr2>	NICE!
	So, now notice the icons.
	Once you perform a local search, you are able to perform a lot more functions.
	To add a member to an existing household from the Participant List Screen, a member of the household must be displayed in the list.
	The Create New Member function is available in two places (just like Create New Household).
	First, we must select a member of the household we want to add someone to from the participant list.
	Let's click on DELHI FLOWERS to highlight her name in the participant list since we were working with her household in the last module.
<newmbr3>	Now, let's click on the Participant List menu.
<newmbr4>	Once a member of the household is highlighted in the participant list, we can add a member using the Create New Member menu option...
<newmbr5>	…or we can click on the Create New Member icon.
	Keep in mind that you always create a new household for the first new member and then Create a New Member or Add Another Member at the end of prescreen for the rest of the members of the household.
	Let's click on the icon so that we can add Delhi's child to the household.

Description	Text
<newmbr6>	As we saw in the last module, the same Applicant Prescreening window opens.
	The Household level fields auto-populate based on the record we selected from the participant list.
NewMember	If you chose "Create New Member" from the Participant List, the system auto-assigns the **same** Household ID as the member highlighted in the participant list.
	If you chose "Add Another Household Member" from another person's Applicant's Prescreening window, the system auto-assigns the new applicant to that same household.
	It also assigns the new member a unique State WIC ID.
	And, just like when creating the household, it saves the new participant to the Montana WIC database.
<newmbr7>	Go ahead and type FLOWERS into the Last name field and press the Tab key or click into the First name field.
<newmbr8>	Type ROSIE into the First name field. Since we aren't going to add a middle initial, click into the Birth Date field.
<newmbr9>	Type Rosie's birth date 03/14/2008 into the field and press the Tab key on your keyboard.
<newmbr10>	Notice that the WIC Category was automatically selected based on Rosie's birth date.
NewMember1	In Applicant Prescreening, M-SPIRIT auto-selects the gender of female for women based on the selection of Pregnant, Breastfeeding, or Non-Breastfeeding from the WIC Category drop-down as soon as you tab out of or click on the next field.
	It also auto-selects the WIC Category for infants and children based on their birth date.
<newmbr11>	Let's click on the Gender drop-down list next…
<newmbr12>	...and select Female.
<newmbr13>	Everything else on this Prescreen has already been auto-filled based on mom's record.
	We are done with Rosie's prescreen.
	Let's go back to the participant list. Do you remember how to do that? Go ahead and do it.

Description	Text
<newmbr15>	Notice that Rosie was added to the bottom of the current participant list.
Tip	Here's a tip: Whenever a participant or multiple members of a household are prescreened, they are always added to the bottom of the current participant list.
PotDupPpts	Potential Duplicate Participants
PotentialDups	Another component of the Applicant Prescreen in M-SPIRIT is the Potential Duplicate Applicant/Participant function. Once a prescreen is completed, M-SPIRIT automatically performs a duplicate record check of the centralized databased for a possible matching record based on these three criteria:
	Same date of birth, same first three letters of the first name and the same first three letters of the last name.
Important	It is important to note that although this is a helpful tool, it is essential that you not rely on it too much. It is not a phonetic search. The criteria limit its usefulness since incorrect spelling of a name can result in missed duplicate matches. For example: S-M-I-T-H vs. S-M-Y-T-H will not open the Potential Duplicate Participants window but if you mis-spelled the name with an "I" instead of "Y" you could potentially create a duplicate record. And, again, why is this important?
PotentialDups1	Right! M-SPIRIT cannot merge duplicate participant records.
	In the end, it is your responsibility, not M-SPIRIT's, to ensure that duplicate records are not created.
<dup>	We are going to create another new household in order to demonstrate the Potential Duplicate Participant functionality.
	Click the Create New Household icon.
<dup1>	For expediency, we are going to fill in the fields using the Tab key and hot keys.
<dup2> - <dup21>	<no script>
<dup22-25>	Deleted

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<dup26>	Notice the Name (Flow, Rosepetal) and Birth Date (03/14/2008).
	Let's see what happens when we complete this prescreen...
	Click OK to complete Rosepetal's prescreening.
<dup27>	deleted
<dup28>	We just finished prescreening Rosepetal Flow whose name and birth date are displayed at the top of the Potential Duplicate Applicant/Participant window.
	The potential duplicate record the system found after searching the statewide database for any matches is listed in the grid.
	Information that may help you determine whether you are creating a duplicate record includes the State WIC ID, Participant Name, WIC Category, Gender, Address, Local Agency, Clinic, Race/Ethnicity...
<dup29>	deleted
<dup30>	Clicking and dragging the scrollbar reveals more columns to the right including....
<dup31>	Mother's Birth Name (if linked to mom's record) and the primary Authorized Representative (or Proxy) name.
<dup32>	That's a fair amount of information to assist you in determining whether this could be the same person.
	In this instance, we are certain that Rosepetal Flow and Rosebud Flowers are two separate people.
<dup33>	Since we've ascertained that our new applicant isn't a duplicate of this record, click the Complete Prescreening button to finish the prescreen and create the new participant record.
<dup34>	As always, Rosepetal is added to the bottom of the current Participant List.
	Let's create one more new household.
	Click the Create New Household icon.
<dup35>	Again, we are going to auto-fill these fields using the Tab key and Hot keys.

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Description	**Text**
<dup36> - <dup52>	<no script>
<dup53>	Notice the name (Rose, Flower) and the Birth Date (03/14/2008).
	Clicking OK will initiate the Potential Duplicate processing.
<dup54>	Deleted.
<dup55>	This time there are two potential matching records for Rose Flower.
	We are sure it isn't Rosebud but we think Rose and Rosie may be one and the same.
	Let's click on Rosie to highlight her record.
<dup56>	We'll use the scroll bar to look at the rest of the information provided in this window.
<dup57>	Nothing else to really go on...
<dup58>	so we ask more questions to ensure we aren't going to accidentally create a duplicate record.
	We believe that Rose whom we just prescreened is the same person as Rosie.
	Clicking the Cancel button in this screen simply closes the Potential Duplicate Applicant/Participant window and returns you to the Prescreen.
	Instead of canceling this window or completing the prescreen we want to open the Participant Folder of the record highlighted in the grid.
	Click the Open Existing Folder button.
Dup59	Selecting Open Existing Folder accomplishes two things.
	Abandons the Prescreen process for Rose and…
	... initiates a system comparison of the Demographics information collected in the Prescreen for Rose against the current information we have recorded for Rosie, the existing participant.
<dup60>	If there are discrepancies between the information just collected for Rose and that already recorded for Rosie, the system momentarily returns to the Prescreen.
<dup61>	deleted

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<dup62>	A system prompt displays that reads: The address and telephone information that was entered for the applicant does not match ithe information that is currently recorded for the selected participant. Do you want to update the participant with this new information? You want to keep the most recent information provided, so as a general rule of thumb, click the Yes button to update the addresss and telephone number.
<dup63>	The system returns to the Participant List momentarily because that is what we had selected in the On Completion section of the Applicant Prescreen. Notice that Rose Flower was not added to the bottom of the Participant List.
<dup64>	But since we selected the Open Existing Folder button in the Potential Duplicate Applicant/Participant window, the system then opens Rosie Flowers' folder.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.